

People Inc. *time*

User Guide

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1 Introduction

The **People Inc. time** system is designed to enable organisations to plan and monitor employee attendance. In addition, **People Inc. time** includes all of the functionality provided by the standard **People Inc. (HR)** system.

This document provides an introduction to the **People Inc. time** product. For the purposes of this document, it is assumed that the **People Inc. time** system is already installed and configured, and that the user has a basic understanding of the standard **People Inc. (HR)** system. The document covers the following areas:

- Defining Groups and Group Views
- Registering Employee Information
- Assigning badges to employees and visitors
- Setting up the employee roster
- Defining shifts and work patterns
- Managing holidays and absence
- Reviewing clock times
- Authorising clock times
- The pay period overview
- Running reports

2 Groups and Group Views

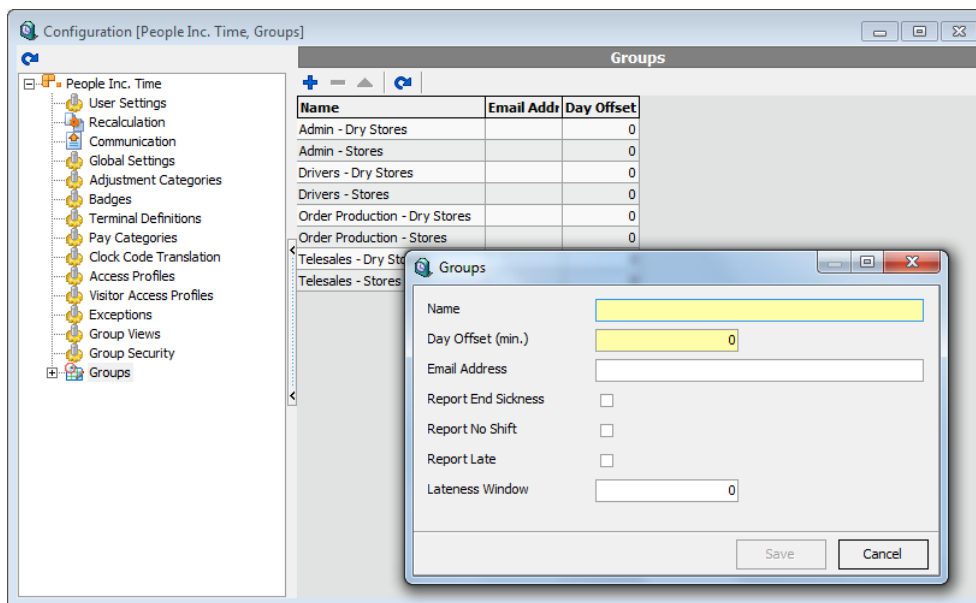
Information relating to employee attendance is managed in **People Inc. time** using Groups. Employees are assigned to Groups to enable users and managers to review their attendance.

2.1 Employee Groups

A Group could equate to a department, but the system provides additional flexibility by defining groups independently of any organisational structure. A group should be added for each area of the organisation that is be managed by a different manager (from the point of view of attendance), or for each area that has different working rules (for example works different shifts or has different rules for overtime or flexitime).

Groups are defined in the Groups section of the Configuration screen.

Configuration Screen: Groups



Use the [+] button to add a new Group. Each of the fields on the Groups screen should be completed.

Each Group must be given a unique name.

The system can be configured to automatically report exceptions to a nominated manager (via e-mail) when employees in a group:

- return to work from a period of sickness
- clock in when they have no shift planned
- clock in late.

Note that this setting is used in conjunction with a setting in the Badge details for individual employees (see below); the system only reports exceptions for an employee if the Report Exceptions facility is enabled in both the Badge definition for the employee and in the definition for their group. The e-mail address used and the particular exceptions to be reported are configured in the Group definition.

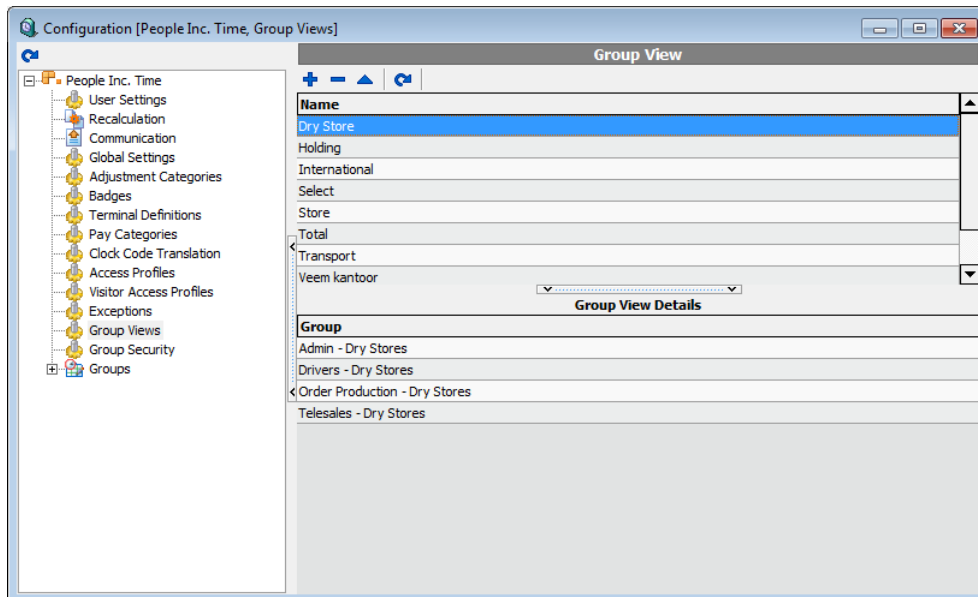
2.2 Group Views

A Group View is a collection of one or more Groups. Using a Group View enables users to see a number of Groups displayed together. A Group View containing more than one Group might be used

for example when managing 3 shifts working on the same production line (managed by one manager). Group Views are used in many screens within the system (the Roster Planning screen, Daily Status screen and the Pay Period Overview screen for example). Any number of Group Views can be defined.

Group Views are defined in the Group Views section of the Configuration screen.

Configuration: Group Views



In the example above 4 groups are viewed together in the Dry Store Group View.

3 Employee Information

Before working with **People Inc.** *time* to manage employee attendance, users should ensure that an Employee record and a current Job History record are added for each employee.

Employee Screen

The screenshot shows the 'Employee Information' screen for Vicky Anderson (Employee ID: 01908 676 767 x8738). The left sidebar lists various employee records, including Job History, Salary History, Benefit History, Absence History, Absence Allowances, Maternity Leave, Paternity Leave, Appraisal History, Training History, CPE/CPD Record, Equipment, Contacts, Children, Disciplinary History, Exit Interviews, Medical History, Skills, and Qualifications. The main area displays personal and employment details.

Personal Information	
Surname	Anderson
First Name	Victoria
Employee Number	EMP010
Status	Active
Title	Mrs
Known as	Vicky
Middle Name	Faye
Initials	V.F.
Maiden Name	Salter

Employment Information	
Contract	Permanent
Date of Join	18/06/2003
Length of Service	7 years, 8 months
Prev Length Service	Years: Months
Total Length of Service	7 years, 8 months
Adjust allowances	<input type="checkbox"/>
Length Service Category	05-09
Probationary Period	3 Months
Probation End Date	18/09/2003
Extended Prob. Period	3 Months
Extended Prob. End Date	18/12/2003
Contract End Date	
Notice Period	3 Months
Leaving Date	

Employee: Job History Screen

The screenshot shows the 'Job History' screen for Vicky Anderson (Employee ID: 01908 676 767 x8738) for the position of Customer Services Manager (Job ID: 01/06/2007). The left sidebar lists various employee records, including Job History, Salary History, Benefit History, Absence History, Absence Allowances, Maternity Leave, Paternity Leave, Appraisal History, Training History, CPE/CPD Record, Equipment, Contacts, Children, Disciplinary History, Exit Interviews, Medical History, Skills, and Qualifications. The main area displays job details.

Job Details	
Job Title	Customer Services Manager
Start Date	01/06/2007
Reason for Change	Promotion
Company	The Orange Time Machine
Location	Milton Keynes
Division	
Department	Customer Care
Cost Centre	
Reports To	
Grade	
End Date	
Work Pattern	Full time - Office hours
Hours Monday	7.50
Hours Tuesday	7.50
Hours Wednesday	7.50
Hours Thursday	7.50
Hours Friday	7.50
Hours Saturday	0.00
Hours Sunday	0.00
Contractual Hours	37.50
FTE	93.75
Originally based on	Full time - Office hours
PI Time Planning group	Admin - Dry Stores
ESS Group	Operations
Extra allowance function	1 (0 = Amount, 1 = TOIL)

3.1 Managing Absence

Absence Rules associated with the absence categories that are to be used when managing attendance information must be defined in the People Inc. system. This should include rules to manage holiday, sickness and any other categories of absence used by the organisation.

Absence Rules Screen

Absence Rules: [Holiday]

Data | Action List : 1 | Documents : 0

Reports | Letters | Email

Allowance Name: Holiday | Carry Over Allowed: ☒ | Carry Over Maximum: 5.00 | Carry Over Expires After: 13 Weeks

Absence Category: Holiday | Allowance Based On: Length of Service | Units: Days

Adjust for Bank Holidays: ☒ | Allow Open-Ended Records: ☐ | Reference Date: Reference date | Allowance Method: Accrued | Rule Starts On: 1 January | Category Default: ☒ | Don't Check Allowanceband: ☐

Status: Current | Absence type: Leave

Absence Rules | 2 : 9 : 9 | Current Absence Rules

Each employee should have the appropriate absence allowances for the current year; most employees will be able to book holidays and may need to be marked absent due to sickness. Only the categories for which an individual employee has a current allowance are available when booking absence against their attendance records.

Employee: Absence Allowances Screen

Absence Allowances: [Vicky Anderson 01908 676 767 x8738] [01/01/2011 1]

Data | Action List : 0 | Documents : 0

Reports | Letters | Email

Start Date	allowancerulesid_abse	Basic Allowance	Additional	Carry Over	Carry over Lost	Booked	Remain
01/01/2011	Sickness	0.00	0.00	0.00	0.00	0.00	0.00
01/01/2011	Holiday	4.82	0.00	23.44	18.44	0.00	0.00
01/01/2000	Parental Leave	0.00	0.00	0.00	0.00	15.94	

Absence Allowances | 1 : 3 : 3 | Current Allowances

Rather than specifying employee, job and absence allowances separately (using individual data screens), the New Employee wizard is designed to add these details quickly and easily. In addition, using this wizard enables users to ensure all the appropriate information is added.

3.2 Assigning Employees to a Group

In **People Inc. time**, employees are managed in groups. A Group could include all the employees within a particular department or team, but the system provides additional flexibility by defining groups independently of any organisational structure. If a particular manager normally manages the attendance for a selection of employees, these employees could be assigned the same group. Note that the attendance for all the employees in a group are managed using the same rules; it may therefore be necessary for a manager to be granted access to a number of Groups to facilitate this.

Assigning an employee to a Group is done in the Job History screen. Employees are assigned to a group by selecting the appropriate value in the PI Time Planning Group field in the current job record.

Employees: Job History

Job History : [Vicky Anderson 01908 676 767 x8738] [Customer Services Manager 01/06/2007]

Employees

- Vicky Anderson 01908 676 767 x8738
- Active Employees (S)
- Job History
- Salary History
- Benefit History
- Absence History
- Absence Allowances
- Maternity Leave
- Paternity Leave
- Appraisal History
- Training History
- CPE/CPD Record
- Equipment
- Contacts
- Children
- Disciplinary History
- Exit Interviews
- Medical History
- Skills
- Qualifications

Job Title: Customer Services Manager

Start Date: 01/06/2007

Reason for Change: Promotion

Company: The Orange Time Machine

Location: Milton Keynes

Division:

Department: Customer Care

Cost Centre:

Reports To:

Grade:

End Date:

Work Pattern: Full time - Office hours

Hours Monday: 7.50

Hours Tuesday: 7.50

Hours Wednesday: 7.50

Hours Thursday: 7.50

Hours Friday: 7.50

Hours Saturday: 0.00

Hours Sunday: 0.00

Contractual Hours: 37.50

FTE: 93.75

Originally based on: Full time - Office hours

PI Time Planning group: Admin - Dry Stores

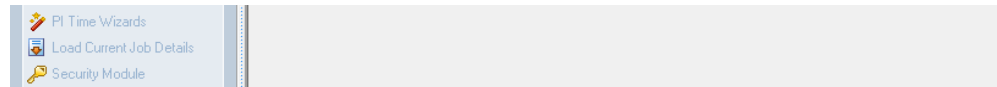
ESS Group: Operations

Extra allowance function: 1 (0 = Amount, 1 = TOIL)

Job History 1 : 2 : 2 Full Job History

When **People Inc. time** starts it loads the current Job records for all employees. This information is used extensively in the system. If changes are made to the Planning Group field in the Job History screen for one or more employees, the current Job records should be re-loaded by clicking the 'Load Current Job Details' shortcut (on the main shortcut bar on the left hand side of the People Inc. screen) or by restarting the system.

People Inc. time: Load Current Job Details



From time to time employees will need to be moved to another group. Employees can be assigned to a new group by either changing the value recorded in the PI Time Planning Group field in their current job history record, or by closing the current job history record (by adding an End Date) and adding a new Job History entry (detailing the new planning Group).

When the group associated with an employee changes (using either of the approaches detailed above) the user should run the Group Synchronization Wizard. This enables them to transfer any existing shifts associated with the employee to the new group. The employee will then be available in the new Group (from the Start Date defined in the Job History record).

Group Synchronisation Wizard

Number	Existing Planning	New Planning	From	Until	Carry Out
54	Admin - Stores - 9.		04/01/2010	19/03/2010	<input checked="" type="checkbox"/>

The Wizard lists all employees that have been moved to another Group and enables the user to replace shifts assigned to the employee in the old group with shifts that are appropriate to the new group. This is done by clicking in the empty 'New planning' field and selecting a shift. The changes are only made once the 'Carry out' box is checked and the Carry Out button pressed. The Wizard then updates the roster with the new shift

3.3 Terminate Employment Wizard

When an employee leaves the company it is important to update the system with their leaving date and change their employee status accordingly. There may also be shifts associated with the employee and they may still have a badge for getting in and out of the building. Rather than updating these screens manually **People Inc. time** provides a wizard to update all of these screens at once and remove all rostered shifted after a particular date.

Terminate Employment Wizard

Set status and dates (Step 2 of 2)

Give the 'Inactive' status and the dates that will be used to end the distinct screen records for employee EMP 134.

Employee

Status: Inactive

Leaving date: 23/11/2011

Job

End date: 23/11/2011

Pay

End date: 23/11/2011

Roster Planning

End date: 23/11/2011

Badge

End date: 23/11/2011

Help < Previous Finish Cancel

Terminate Employment Wizard 3.4.3 Terminates the employment of:

4 Badges

Before an employee can clock in, they must be assigned a badge within the system. Only once this is done is it possible to register and manage attendance information for the employee. Access control is also based on the badges assigned to employees. Badges are assigned to employees in the Badges section of the Configuration screen.

4.1 Badges

Badges can be a physical item carried by the employee (for example a proximity tag or ID-card) or it may be a notional badge (used for example when the employee clocks in using a fingerprint).

Configuration Screen: Badges

Configuration [People Inc. Time, Badges]

Badges

Standard (34) Visitor

Badge Number	Username	Start Date	End Date	Anti Passb	Report Exc
00006	Norton, D.H., David - 11	01/01/2010	//	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
00007	Smith, B., Bev - 12	01/01/2010	//	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
00008	Ahern, E.R., Erica - 13	01/01/2010	//	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
00010	Anderson, V.				
00023	Barday, M.				
00033	Duncan, L.H.				
00039	Paterson, J.				
00046	Boardman, V.				
00052	Lewis, V., V.				
00053	Morris, L., L.				
00055	Nicholls, L., L.				
00056	Richardson, J.				
00061	Smith, A.E., - 120				
00062	James, R., R.				
00063	Davies, M., M.				
00064	Schwab, J.K.				
00067	Richardson, J.				
00070	Jones, K.T.				
00076	Anthony, J.				
00077	Alonso, K., K.				

Badges

Badge Number: 00061

Start Date: 01/01/2010

End Date: //

Badge Type: Standard

Employee: Smith, A.E., - 120

☐ Also show employees with a badge that expires

Visitor:

Anti Passback: ☒

Report Exceptions: ☒

Save Cancel

There are two types of badge, Standard and Visitor. Standard badges are assigned to employees; Visitor badges are used for other people. The Visitor badges are useful when the system is also used for access-control (for example where cleaners need access to the building, or for directors who do not need to clock in).

To create a new badge, click the blue plus (+) button and complete the badge information.

- All badges have a number. Numbers must be 5 digits in length. Where badge numbers have fewer than 5 digits, leading zeros should be used to prefix the number (e.g. 5 must be entered as 00005).
- A range of dates are associated with a badge. The badge will not work until the start date is reached, and will stop working when the end date is reached. It is not necessary to specify an end date.
- A badge number can be reused (issued to a different employee) provided the range of dates used do not overlap with other badges of the same number.
- The badge type is either Employee or Visitor. When setting up a badge for employees, the employee should be selected from the drop-down. This drop-down lists employees that do not currently have a badge (it is also possible to include employees who have a badge that has expired).
- When a badge is created for a visitor the user should type the name of the visitor in the Visitor box. Visitor badges are normally issued to third-parties (for example cleaners) to monitor attendance and manage access to buildings. Badges issued to senior staff (for example directors) may be categorised as Visitor badges as these badges are not associated with a roster.

- The Anti-Passback setting controls advanced features designed to maximise the quality of clock-events when employees clock in and out. By default, anti-passback should be enabled (ticked).
- The Report Exceptions box should be ticked if details of exceptions are to be e-mailed to the group manager when the employee using the card is late for work, when they clock in but should not be at work, or they return from a period of sickness.

5 Roster Planning

The Roster Planning screen enables users to select which employees will work which shifts. Employees are displayed in Groups, and where a Group View includes more than one Group, these are listed together in the Roster. The Roster Planning screen displays the roster for a week. When the Roster Planning screen opens it will display the roster for the current week for the first available Group View.

Roster Planning Screen

The screenshot shows the 'Roster Planning [2010, 4, Dry Store]' window. At the top, there are controls for 'Year' (set to 2010) and 'Week' (a dropdown menu). A 'Group View' dropdown is set to 'Dry Store'. Below these are icons for file operations. The main area is titled 'Groups' and contains several expandable sections, each with a table of employee rosters for the week of Monday 25-01 to Sunday 31-01.

Admin - Dry Stores

Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Morris, L., Lou - 103	Account Manager							
Anderson, V.F., Vicky - 15	Customer Services Manager	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	
Ahern, E.R., Erica - 13	Senior Shift Leader	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30		

Drivers - Dry Stores

Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Paterson, J.J., Jo - 157	Sales Representative	8:00 - 15:00 FT 8	8:00 - 15:00 FT 8	8:00 - 15:00 FT 8	8:00 - 15:00 FT 8	8:00 - 15:00 FT 8		
Duncan, L.H., Lynn - 162	Fork Truck Driver							
Brooker, S.C., Sam - 152	Machine Operator		9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	08:00 - 15:00	

Order Production - Dry Stores

Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Lewis, V., Vicky - 102	Human Resources Manager							
Dupont, A.M., Anne-Marie - 165	Machine Operator	6:00 - 15:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00		
Duncan, L.H., Lynn - 162	Fork Truck Driver	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00		

Telesales - Dry Stores

Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Key, A., Alana - 17	Sales Manager	9:00 - 17:00	9:00 - 17:00			9:00 - 17:00		
Jones, K.T., Katie - 172	Packer	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	6:00 - 15:00	
James, R., Ritchie - 173	Machine Operator	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	6:00 - 15:00	
Hepworth, M.K., Michelle - 178	Administrative Assistant		6:00 - 15:00	6:00 - 15:00	6:00 - 15:00	6:00 - 15:00		
Boardman, L., Lynn - 168	Packer							

Below the rosters, there are tabs for 'Holiday and Absence', 'Absence Requests', and 'Plugin Messages'. The 'Holiday and Absence' tab is active, showing a table with columns: 'Start Date', 'End Date', 'Rule', 'Recurring Partial Day', and 'Reason'.

The user can load the roster for another Group View by selecting the Group View from the drop-down at the top of the screen. Further drop-down controls enable the user to display the roster for other weeks and years.

5.1 Completing the Weekly Roster

When a Group is first loaded into the Roster Planning screen, the cells associated with the working days (Monday to Sunday) are empty. The user creates the roster by right-clicking on the cells and selecting a shift for each employee for each day.

When the user does this, the system lists only shifts that employees in the Group are allowed to work together with any absence categories assigned to the employee. For information on adding more shifts to the list, see the section in this document on defining shifts.

Planning a Shift for an Employee

Drivers - Dry Stores						
Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01
Paterson, J.J., Jo - 157	Sales Representative	8:00 - 15:00 FT 8	8:00 - 15:00 FT 8	8:00 - 15:00 FT 8	8:00 - 15:00 FT 8	8:00 - 15:00 FT 8
Duncan, L.H., Lynn - 162	Fork Truck Driver					
Brooker, S.C., Sam - 152	Machine Operator				9:00 - 17:00	9:00 - 17:00

Order Production - Dry Stores						
Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01
Lewis, V., Vicky - 102	Human Resources Manager					
Dupont, A.M., Anne-Marie - 165	Machine Operator	6:00 - 15:00			8:00 - 17:00	8:00 - 17:00
Duncan, L.H., Lynn - 162	Fork Truck Driver	8:00 - 17:00			8:00 - 17:00	8:00 - 17:00

Telesales - Dry Stores						
Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01
Key, A., Alana - 17	Sales Manager	9:00 - 17:00				9:00 - 17:00
Jones, K.T., Katie - 172	Packer	9:00 - 17:00				9:00 - 17:00

Allocating shifts one-by-one for individual employees on individual days in this way is time-consuming and inefficient. Users can therefore select more than one day or more than one employee and allocate the same shift to them all (at the same time).

Planning a Shift for multiple Employees on multiple days

Order Production - Dry Stores								
Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Lewis, V., Vicky - 102	Human Resources Manager							
Dupont, A.M., Anne-Marie - 165	Machine Operator	6:00 - 15:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00		
Duncan, L.H., Lynn - 162	Fork Truck Driver	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00	8:00 - 17:00		

Telesales - Dry Stores								
Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Key, A., Alana - 17	Sales Manager	9:00 - 17:00				9:00 - 17:00		
Jones, K.T., Katie - 172	Packer	9:00 - 17:00				9:00 - 17:00	6:00 - 15:00	
James, R., Ritchie - 173	Machine Operator	9:00 - 17:00				9:00 - 17:00	6:00 - 15:00	
Hepworth, M.K., Michelle - 178	Administrative Assistant					6:00 - 15:00		
Boardman, L., Lynn - 168	Packer							

Once a shift is selected, it is displayed in the appropriate cells. Where an employee is registered as absent (on holiday for example) the appropriate cells will have a different background colour (by default these colours are teal for holidays and mauve for sickness).

Holiday and sick days

Admin - Dry Stores								
Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Key, A., Alana - 17	Sales Manager	9:00 - 17:00	9:00 - 17:00			9:00 - 17:00		
Jones, K.T., Katie - 172	Packer	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	6:00 - 15:00	
James, R., Ritchie - 173	Machine Operator	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	6:00 - 15:00	
Hepworth, M.K., Michelle - 178	Administrative Assistant		6:00 - 15:00	6:00 - 15:00	6:00 - 15:00	6:00 - 15:00		
Boardman, L., Lynn - 168	Packer							

5.2 Copying Weekly Rosters

To save time, once a weekly roster has been defined, it can be copied to other weeks. The Copy Options button (the second button in the row of 4 buttons) shows a panel providing a range of functionality enabling users to copy a weekly roster.

The functionality enables users to copy the roster for a week (or a roster of more than a week) to other weeks. For each option, the roster can be copied for the current employee or for all employees in the Group View. Note that when copying the roster, the system will overwrite any existing week rosters.

Copy Options – duplicate current week

Duplicate Current Week Copy Other Weeks

Year 2011 Week from 12 Week until 12

Even ☒ Odd ☒

Current Employee ☐ Anderson, V.F., Vicky - 15

Copy

There are a number of options when copying a weekly roster using this tab:

- copy the current week to another selected week
- copy the current week to a range of weeks
- copy the current week to the end of the year
- copy the current week to all the even (or odd) weeks within a range of weeks

When using the copy facility, the user could for example set up a 4-on-4-off shift pattern for a group of employees by defining 8 weeks manually (this pattern repeats after 8 weeks). The copy facility could then be used to copy this right through to the end of the year.

Copy Options – copy other weeks

Duplicate Current Week Copy Other Weeks

Period from Year 2011 Week from 12 Week until 12

Period to Year 2011 Week from 12 Week until 12

Current Employee ☐ Anderson, V.F., Vicky - 15

Copy

The second tab on the copy options screen enables the user to copy the roster defined for a range of weeks from a specified year to another range of weeks in a specified year. This is particularly useful to copy complex or variable rosters from one period to another, or to base the roster for the coming year on the roster for the previous year.

5.3 Scheduling work for an employee from another group

The roster screen enables users to temporarily add individual employees from another Group to the roster for the current group. This is useful for example when extra resource is temporarily needed in a certain department for a period of time.

Clicking on the Groups button (the first button in the row of 4 buttons) enables users to display a list of employees from other Groups. When a Group is selected, the system will display a list of the Employees in that Group. By dragging and dropping an employee from the list onto the main employee roster, the user can temporarily add an employee to the current Group.

When an employee is temporarily added to a group, any bookings marked in the roster for their own group are preserved and the system stops the user from double-booking them. Where bookings already exists (in another group) cells in the roster for these days are marked in yellow (by default).

Using employees from another Group

Roster Planning [2010, 4, Dry Store]

Year: 2010 Group View: Dry Store Week: 4

Admin - Stores

Employee

- Dawson, E. J., Lizzie - 100
- Nicholls, L., Lucy - 105
- Norton, D.H., David - 11
- Richardson, C., Claudia - 111
- Robinson, C., Claire - 114
- Smith, A.E., Annie - 120
- Smith, B., Bev - 12

7

Groups

Admin - Dry Stores

Emp Id	Job	Mo 25-0	Tu 26-0	We 27-0	Th 28-0	Fr 29-0	Sa 30-0	Su 31-0
Morris, L., Lou - 103	Account Manager							
Anderson, V.F., Vicky - 1	Customer Services Ma	7:30 - 16:	7:30 - 16:	7:30 - 16:	7:30 - 16:	7:30 - 16:	7:30 - 16:	
Ahern, E.R., Erica - 13	Senior Shift Leader	7:30 - 16:	7:30 - 16:	7:30 - 16:	7:30 - 16:	7:30 - 16:	7:30 - 16:	

Drivers - Dry Stores

Emp Id	Job	Mo 25-0	Tu 26-0	We 27-0	Th 28-0	Fr 29-0	Sa 30-0	Su 31-0
Paterson, J.J., Jo - 157	Sales Representative	8:00 - 15:	8:00 - 15:	8:00 - 15:	8:00 - 15:	8:00 - 15:		
Duncan, L.H., Lynn - 162	Fork Truck Driver							
Brooker, S.C., Sam - 152	Machine Operator		9:00 - 17:	9:00 - 17:	9:00 - 17:	9:00 - 17:	08:00 - 1	

Order Production - Dry Stores

Emp Id	Job	Mo 25-0	Tu 26-0	We 27-0	Th 28-0	Fr 29-0	Sa 30-0	Su 31-0
Lewis, V., Vicky - 102	Human Resources Ma							
Dupont, A.M., Anne-Mar	Machine Operator	6:00 - 15:	8:00 - 17:	8:00 - 17:	8:00 - 17:	8:00 - 17:		
Dawson, E. J., Lizzie - 100	Sales Director	6:00 - 15:	6:00 - 15:	8:00 - 17:	8:00 - 17:	8:00 - 17:		

Telesales - Dry Stores

Emp Id	Job	Mo 25-0	Tu 26-0	We 27-0	Th 28-0	Fr 29-0	Sa 30-0	Su 31-0
Key, A., Alana - 17	Sales Manager	9:00 - 17:	9:00 - 17:			9:00 - 17:		
Jones, K.T., Katie - 172	Packer	9:00 - 17:	9:00 - 17:	9:00 - 17:	9:00 - 17:	9:00 - 17:	6:00 - 15:	
James, R., Ritchie - 173	Machine Operator	9:00 - 17:	9:00 - 17:	9:00 - 17:	9:00 - 17:	9:00 - 17:	6:00 - 15:	
Hepworth, M.K., Michelle	Administrative Assista		6:00 - 15:	6:00 - 15:	6:00 - 15:	6:00 - 15:		
Boardman, L., Lynn - 168	Packer							

In the above example Lizzie Dawson has been moved temporarily from the Admin Stores group to the Order Production Group (where she has been scheduled to work the entire week, on 2 different shifts). Note that an employee can have only 1 Shift per day.

If an employee has been outsourced to another group, this will also be indicated in the appropriate cells in the roster for their own group (by default in yellow). In the image below, the yellow cells indicate that Lizzie Dawson has been scheduled to work Monday to Friday in another Group.

An Employee Outsourced to another Group

Roster Planning [2010, 4, Store]

Year: 2010 Group View: Store Week: 4

Admin - Stores

Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Smith, B., Bev - 12	Production Manager		8:30 - 17:00	8:30 - 17:00	8:30 - 17:00	8:30 - 17:00		
Smith, A.E., Annie - 120	Marketing Assistant		8:00 - 15:30	8:00 - 15:30	8:00 - 15:30	8:00 - 15:30		
Robinson, C., Claire - 114	Help Desk Operator	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30		
Richardson, C., Claudia - 111	Account Manager	8:30 - 17:00	8:30 - 17:00	8:30 - 17:00	8:30 - 17:00	8:30 - 17:00		
Norton, D.H., David - 11	Administrative Manager	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30		
Nicholls, L., Lucy - 105	Customer Services Manager	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30		
Dawson, E. J., Lizzie - 100	Sales Director							

Drivers - Stores

Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Davies, M., Mark - 122	Packer	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30	7:30 - 16:30		

Order Production - Stores

Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Schwab, J.K., Julia - 123	Machine Operator	8:30 - 17:00	8:30 - 17:00	8:30 - 17:00	8:30 - 17:00	8:30 - 17:00		

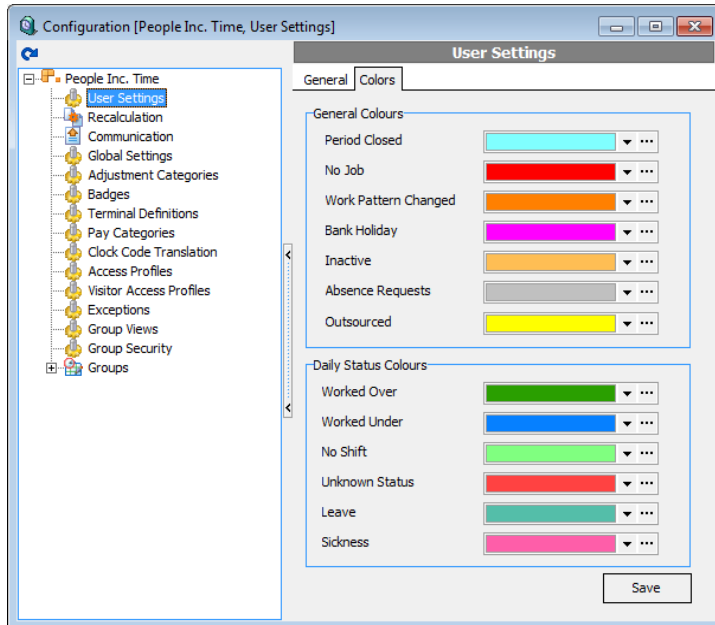
Telesales - Stores

Emp Id	Job	Mo 25-01	Tu 26-01	We 27-01	Th 28-01	Fr 29-01	Sa 30-01	Su 31-01
Richardson, C.W., Clive - 127	Shift Leader	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	9:00 - 17:00	

5.4 Setting Colour Preferences

The colours displayed in the roster planning screen can be changed in the User Settings screen.

Configuration: User Settings



6 Defining Shifts

All the shifts used within each Group need to be defined within **People Inc. time** before employees can be scheduled to work using the roster planning screen. Shifts are defined at a Group level using the Configuration screen.

6.1 Shift Settings

To view or adjust the settings for shifts associated with a Group, open the appropriate Group in the Configuration screen.

Configuration: Groups: Shifts

The screenshot shows the 'Configuration: Groups: Shifts' window. On the left is a tree view of the configuration hierarchy. The main area displays a table of shifts and a detailed view of a selected shift.

Name	Type	Start Time	End Time	Total Hour	Start Date	End Date
6:00 - 15:00	Fixed	06:00	15:00	9.00	01/01/2007	
7:30 - 16:30	Fixed	07:30	15:00	7.50	01/01/2007	

The detailed view for the '7:30 - 16:30' shift is shown below:

General | Roundings | Fixed

Standard

Name: 7:30 - 16:30
Type: Fixed
Reference: Shift Hours
Day Offset (min.): 0
Paid Before Start: ☐
Auto-Clock Employees: ☐

Scope

Start Date: 01/01/2007
End Date: / /

Times

Start Time: 07:30
End Time: 15:00

Min. Start	Min. End	Start Time	End Time	Pay Category	Mandatory	Clock
0	180	07:30	10:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>
180	210	10:30	11:00	Break	<input checked="" type="checkbox"/>	<input type="checkbox"/>
210	360	11:00	13:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>
360	390	13:30	14:00	Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>
390	540	14:00	16:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Save, Cancel

New shifts are added using the blue plus [+] button.

A Shift has the following settings and options:

- The Name of the Shift
- The Type of shift.
 - When Fixed is selected, there is no flexibility in the Start Time or the End Time for employees working on the shift. The Fixed option is only used with Reference: Shift Hours.
 - When Flexible is selected, there is some flexibility in the Start Time and the End Time for employee. For example the employee might be free to come 30 minutes before or after the Start Time. The Flexible option is only used with Reference: Shift Hours.
- The Reference setting.
 - When Shift Hours is selected, time clocked before the Start Time is not registered. This is normally used in a production environment where employees should not register time worked before their scheduled Start Time.
 - When Unrestricted is selected the system begins to register time at work when an employee clocks in. This is often used where employees can start at any time and means that it is not necessary to define lots of Shifts. Employees can never be late with this type of Shift.

- The Day Offset (minutes). This setting is used for night shifts. If the End Time of a shift is after midnight the Day Offset enables users to move the end of the day to a point past the last possible clock time. This ensures the full shift is registered in one day.
- Paid Before Start setting. If this setting is selected, any time worked before the shift Start Time is paid (can only be used with Type: Fixed and Reference: Shift Hours).
- Auto-Clock Employees setting: When this setting is used, the system will register start and end times for the employee as defined in the shift, even if clock times are registered (the system will ignore these).
- The Start Time and End Time for the Shift.


A Shift has a Start Date and an End Date. The shift can only be used in the Roster Planning screen between these dates.

Once a Shift has been defined, it can be copied and used as the basis for the definition of another shift (either for the current Group, or for another Group).

6.2 Shift Bands

Shift bands can be added to the shift definition to schedule working periods and breaks. Bands are added (saved and deleted) using the small button bar below the grid of bands. Use the [+] button to add a band.

Shift Bands

Min. Start	Min. End 	Start Time	End Time	Pay Category	Mandatory	Clock
0	180	07:30	10:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>
180	210	10:30	11:00	Break	<input checked="" type="checkbox"/>	<input type="checkbox"/>
210	360	11:00	13:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>
360	390	13:30	14:00	Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>
390	540	14:00	16:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>

When a band is added, the Start Time and End Time default to the free time available in the shift (based on the Start and End times defined for the shift). For each band, the End Time and Pay Category are specified by the user by clicking in the appropriate cell in the grid and selecting an option. The Start Minutes, End Minutes and Start Time are all added automatically by the system as bands are added.

Breaks can be set as Mandatory. This means that the Employee does not have to physically go to the terminal to clock out for a Break (nor do they need to clock back in afterwards). If a break is set as mandatory, the system will automatically insert the break at the set times. For an Unrestricted Shift the Break will be added relative to the clocking-in time.

6.3 Rounding

It is possible to set the system so that, when an employee works on a particular shift, their clock times are automatically rounded. This setting is defined on the Rounding tab.

Shift Rounding tab

The screenshot shows the 'Shifts' application window with the 'Rounding' tab selected for a 'Fixed' shift type. The 'Clock In Rounding' section has 'Active' checked, 'Minutes' set to 10, 'Round To' set to 'Next', and an 'Example' of 07:30. The 'Clock Out Rounding' section has 'Active' checked, 'Minutes' set to 10, 'Round To' set to 'Previous', and an 'Example' of 15:00. Below these settings is a table with the following data:

Min. Start	Min. End	Start Time	End Time	Pay Category	Mandatory	Clock
0	180	07:30	10:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>
180	210	10:30	11:00	Break	<input checked="" type="checkbox"/>	<input type="checkbox"/>
210	360	11:00	13:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>
360	390	13:30	14:00	Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>
390	540	14:00	16:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>

At the bottom of the window are 'Save' and 'Cancel' buttons.

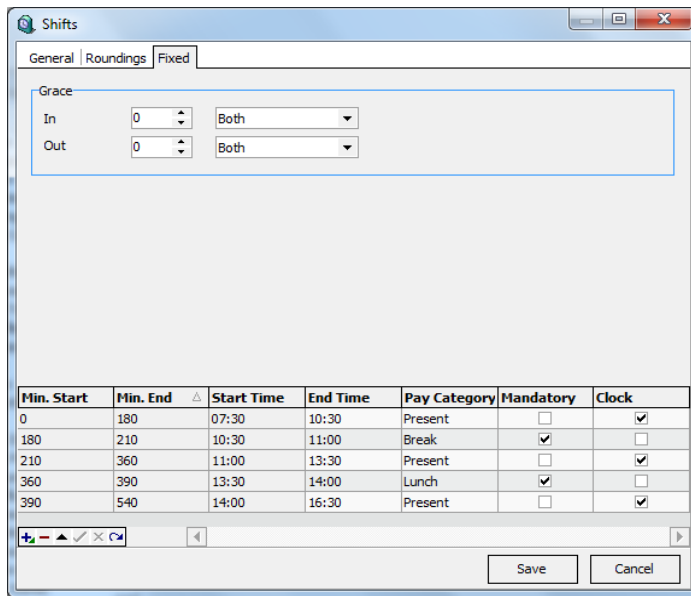
Note that rounding is only applied when the employee clocks in or clocks out (it is not applied to breaks or when an employee changes to another Pay Category such as Off-Site Working).

6.4 Other settings for Fixed Shifts

Grace Minutes can be applied to shifts of type Fixed. Grace minutes are most effectively used in conjunction with rounding.

For example, it is possible to round clock times to the next 15 minutes, but to give 3 minutes grace. In this situation, if an employee is 10 minutes early, the system will round to the start time, if they are up to 3 minutes late the system still clocks them in at the start time, but if they are more than 3 minutes late, the system rounds the time (initially) to 15 minutes late.

Shift Fixed Tab



Min. Start	Min. End	Start Time	End Time	Pay Category	Mandatory	Clock
0	180	07:30	10:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>
180	210	10:30	11:00	Break	<input checked="" type="checkbox"/>	<input type="checkbox"/>
210	360	11:00	13:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>
360	390	13:30	14:00	Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>
390	540	14:00	16:30	Present	<input type="checkbox"/>	<input checked="" type="checkbox"/>

On Type – Flexible Shifts you can set flexible bands for employees to clock in or out. In the above example the employee can clock in half an hour before and after Start and End Time. This is normally used when you want employees to be work for example between 10:00 and 16:00, but outside these times they have flexibility to work their contracted hours.

6.5 Adjustments on Daily Basis

Adjustments are defined on Group level meaning each group can have different adjustments to best suit the business needs.

Adjustments are linked to shifts. This allows the user to define separate overtime rules for different shifts, for example night shifts. This also means that for overtime to be calculated a shift must be rostered for the day in question.

Daily Adjustments

The screenshot shows a software configuration window titled "Configuration [People Inc. Time, Groups, Drivers - Dry Stores, Shifts]". The left sidebar contains a tree view with the following structure:

- People Inc. Time
 - User Settings
 - Recalculation
 - Communication
 - Global Settings
 - Adjustment Categories
 - Badges
 - Terminal Definitions
 - Pay Categories
 - Clock Code Translation
 - Access Profiles
 - Visitor Access Profiles
 - Exceptions
 - Group Views
 - Group Security
 - Groups
 - Admin - Dry Stores
 - Admin - Stores
 - Drivers - Dry Stores
 - Pay Periods
 - Adjustments
 - Shifts**
 - Access Profiles
 - Additional Access
 - Period Adjustments
 - Bank Holidays
 - Drivers - Stores
 - Order Production - Dry Stores
 - Order Production - Stores
 - Telesales - Dry Stores
 - Telesales - Stores

The main area displays a table titled "Shifts" with the following data:

Name	Type	Start Time	End Time	Total Hour	Start Date	End Date
06:00 - 13:00 Early 8	Fixed	06:00	14:00	8.00	01/01/2007	
08:00 - 15:00	Fixed	08:00	15:00	7.00	01/01/2007	
13:00 - 21:00 Late 8	Fixed	13:00	21:00	8.00	06/11/2006	
8:00 - 15:00 FT 8	Fixed	08:00	15:00	7.00	01/01/2007	
9.00 - 17.00	Fixed	09:00	17:00	8.00	01/01/2007	

Below the shifts table is a section titled "Shift Adjustments" with a dropdown menu and a table:

Name	Start Date	End Date
OT 133%	01/07/2008	/ /

Selecting a shift will display any overtime adjustments associated with that shift in the lower portion of the screen. Double clicking in this area on the screen will allow more adjustments to be added. Adding another adjustment is performed by double clicking the desired rule

7 Work Patterns

The Work Pattern screen displays the employees' planned shifts for each week. The Work Pattern is imported from the Job History screen in People Inc. For staff that have the same work pattern week on week, no changes will need to be made to this screen.

Ad hoc adjustments can be made to the Work Pattern to allow for temporary shift changes or when an employee works different hours week to week. These edited shifts will be highlighted in yellow. Weeks can then be duplicated to later dates using the Copy Tool.

The work pattern is primarily used to calculate overtime. If overtime rules are based on anything other than daily accrual of hours the work pattern will represent an average working week. The work pattern does not have to mirror the roster exactly in this situation.

In the situation where overtime is based on daily shifts the work pattern will have to match the roster exactly. **People Inc.** time can be configured to automatically copy rostered hours to the Work Pattern each night so users do not have to keep both screens synchronised manually.

Work Pattern Screen

Work Pattern [2011, 20, Dry Store]

Year: 2011, Week: 20, Group View: Dry Store

Groups

- Admin - Dry Stores
- Drivers - Dry Stores
- Order Production - Dry Stores
- Telesales - Dry Stores

Emp Id	Mo 16-05	Tu 17-05	We 18-05	Th 19-05	Fr 20-05	Sa 21-05	Su 22-05
Ahern, E.R., Erica	8.00	8.00	8.00	8.00	8.00	0.00	0.00
Anderson, V.F., V	7.00	7.00	7.00	7.00	7.00	0.00	0.00
Paterson, J.J., Jo	7.50	7.50	7.50	7.50	7.50	0.00	0.00
Duncan, L.H., Lyn	6.00	6.00	6.00	6.00	6.00	0.00	0.00
Dupont, A.M., Ani	5.00	5.00	5.00	0.00	0.00	0.00	0.00
Boardman, L., Lyr	7.50	7.50	7.50	7.50	0.00	0.00	7.50
Brooker, S.C., Sar	7.50	7.50	7.50	7.50	7.50	0.00	0.00
Hepworth, M.K., M	7.50	7.50	7.50	7.50	7.50	0.00	0.00
James, R., Ritchie	5.00	5.00	5.00	5.00	0.00	0.00	0.00
Jones, K.T., Katie	7.50	7.50	7.50	7.50	7.50	0.00	0.00
Key, A., Alana - 1	7.50	7.50	7.50	7.50	7.50	0.00	0.00

8 Holiday and Absence

Although absence information can be viewed via the absence history screen (viewed via the employee screen), all absence management is done through the **People Inc. time** Holiday and Absence screen. This screen allows a manager to book future authorised absences and record sickness.

All **People Inc. time** absence information is automatically available through the Absence History screen in People Inc. so any current report strategy will still function. Any changes to absences must be performed through the **People Inc. time** Holiday and Absence screen.

Please note that all absence rules in People Inc. must be calculated in hours.

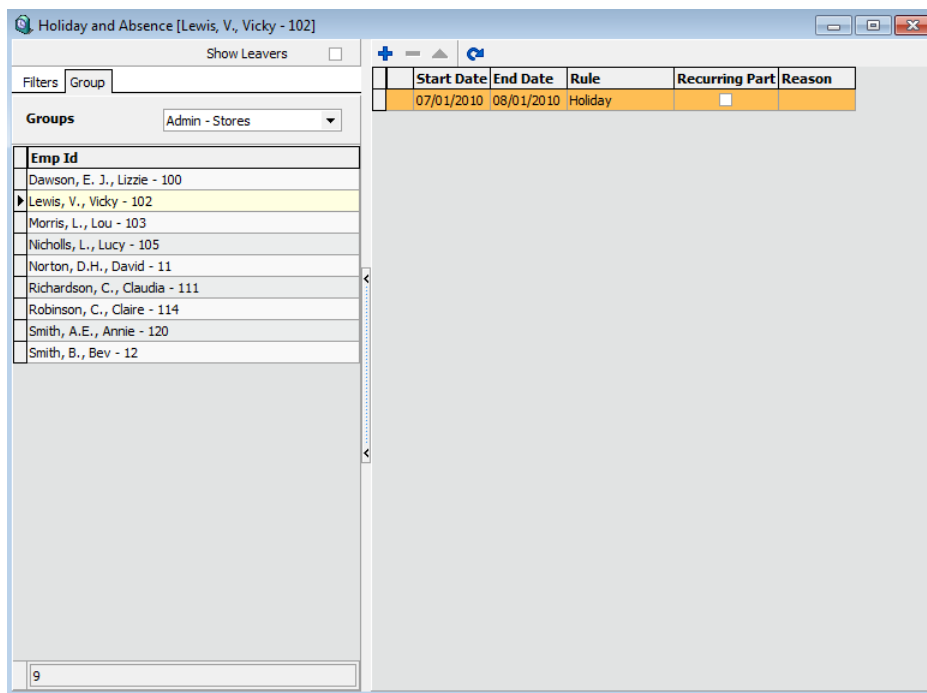
Within **People Inc. time** there are four screens in which holiday and absence can be booked.

- Holiday and Absence screen
- The Roster Planning Screen
- Employee Self Service Absence Requests

8.1 Holiday and Absence screen

The Holiday and Absence screen is accessed from the Sidebar.

Holiday and Absence Screen



Once an employee is highlighted a list of their absences will display to the right of the screen.

Absences can be added, deleted and modified using the three icons [+] [-] [▲] once an employee is selected.

Absence Data Entry Screen

The screenshot shows a software window titled "Holiday and Absence". It contains the following elements:

- Rule:** A dropdown menu set to "Holiday" with a numeric value "15.31" displayed to its right.
- Reason:** An empty dropdown menu.
- Planning Reason:** An empty text input field.
- Notes:** A large, empty text area for additional information.
- Recurring Partial Day:** A checkbox that is currently unchecked.
- Start Section:** A group box containing:
 - Start Type:** A dropdown menu set to "Whole day".
 - Start Date:** A date picker dropdown showing "07/01/2010".
- End Section:** A group box containing:
 - End Type:** A dropdown menu set to "Whole day".
 - End Date:** A date picker dropdown showing "08/01/2010".
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

The above screen will appear when adding or modifying an absence record. Absence rules available to that employee can be chosen using the drop down. Additional information such as reason and notes can be added to the record.

Absences in **People Inc. time** can be whole days or part days by applying the appropriate setting. When booking full days **People Inc. time** will take into consideration the rostered hours for that specific day and deduct them from the allowance.

Within this screen there is also the option to have a partial day recur for a specified time period.

8.2 Adding Absence via Roster Planning

Absences can also be booked through the Roster Planning screen.

Absences are added by right-clicking on a day and selecting an available absence rule. Multiple days can be highlighted by clicking and dragging the selection to encompass the required days. Right-clicking the selected days will provide the option to book absences for all highlighted days.

Once a rule has been chosen a screen will appear that will allow any extra information to be recorded.

Please note that open sickness records cannot be closed or edited using the Roster Planning screen.

Roster Planning Screen

Roster Planning [2011, 20, Dry Store]

Year: 2011 Group View: Dry Store

Week: 20

Groups

- Drivers - Dry Stores

Emp Id	Job	Mo 16-05	Tu 17-05	We 18-05	Th 19-05	Fr 20-05	Sa 21-05	Su 22-05
Paterson, J.J., Jo - 157	Sales Represent							
- Order Production - Dry Stores

Emp Id	Job	Mo 16-05	Tu 17-05	We 18-05	Th 19-05	Fr 20-05	Sa 21-05	Su 22-05
Dupont, A.M., Anne-Marie	Machine Operati							
Duncan, L.H., Lynn - 162	Fork Truck Drive							
- Telesales - Dry Stores

Emp Id	Job	Mo 16-05	Tu 17-05	We 18-05	Th 19-05	Fr 20-05	Sa 21-05	Su 22-05
Key, A., Alana - 17	Sales Manager							
Jones, K.T., Katie - 172	Packer							
James, R., Ritchie - 173	Machine Operati							
Hepworth, M.K., Michelle	Administrative A							
Brooker, S.C., Sam - 152	Fork Truck Drive							
Boardman, L., Lynn - 168	Packer							

Holiday and Absence: 6.00 - 15.00, 9.00 - 17.00, Clear, Holiday and Absence, Sickness, Holiday

Holiday and Absence | Absence Requests | Plugin Messages

Start Date	End Date	Rule	Recurring Partial Day	Reason
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8.3 Adding Holiday / Absence via Employee Self Service

An employee can request an absence using the People Inc. Employee Self Service module. This allows employees to input all information relating to times and dates and only requires a manager to approve the request. After saving the request an e-mail will be sent automatically to the appropriate manager. Once the request has been approved the absence will be visible within **People Inc. time**.

8.4 Calculation of the Duration of Absence

Absences are calculated using the rostered hours for individual days. Any full day absences will take in to consideration the rostered hours on the relevant days and deduct the appropriate hours. If no hours have been rostered for the day in question then no hours will be deducted from absence allowance.

Part day absences can take into consideration clock times. For example if an employee books absence from 13:00 but doesn't clock out until 13:30 then time between 13:00 and 13:30 will not be considered absence. This is only default functionality and can be edited so that in the example absence will be counted from 13:00

9 Daily Status

The Daily Status screen provides an overview of a particular week and is arguably the most important screen in the system as it ensures data is clean, complete and ready for payroll. It compares planned hours with actual hours and allows the user to see any exceptions quickly and easily through the use of colours. Any relevant business rules and overtime adjustments are applied so the user can get a full and realistic view of how many hours each employee has worked and the hours payable.

Colours are used to denote any exceptions such as not working full rostered hours or forgetting to clock out at the end of the shift. These colours allow a manager to see problems at a glance and make any necessary changes to keep the data as clean as possible. The user should ensure that no red Unknown Status exceptions are left on the screen as some or all hours worked on these shifts will not be considered paid hours until the exception is dealt with.

Daily Status Screen

Daily Status [2010, 6, Dry Store]

Year: 2010 Group View: Dry Store

Week: 6

Update Absence Allowances

☐ Worked Over ☐ Unknown Status ☒ No Job ☒ Outsourced
☒ Worked Under ☒ Leave ☐ Period Closed
☐ No Shift ☒ Sickness ☒ Bank Holiday

Groups

☒ Admin - Dry Stores

Emp Id	Mo 08-02	Tu 09-02	We 10-02	Th 11-02	Fr 12-02	Sa 13-02	Su 14-02
Anderson, V.F., Vicky - 15	07:20 - 18:20 (110)	07:20 - 18:50 (140)	07:20 - 18:30 (120)	11:10 - 20:00 (20)	07:20 - 18:40 (130)	07:30 - 15:00 (-480)	
Ahern, E.R., Erica - 13	08:40 - 20:30 (170)	07:30 - 16:30 (0) *	07:50 - 17:20 (30)	07:50 - 17:40 (50)	09:00 - 17:20 (-40)		

☒ Drivers - Dry Stores

Emp Id	Mo 08-02	Tu 09-02	We 10-02	Th 11-02	Fr 12-02	Sa 13-02	Su 14-02
Paterson, J.J., Jo - 157	08:00 - 16:20 (80)	08:10 - 15:20 (10)	08:10 - 15:50 (40)	08:20 - 15:20 (0)	08:10 - 15:50 (40)		
Brooker, S.C., Sam - 152	10:41 - 17:07 (386)	08:00 - 17:20 (20)	08:40 - 17:20 (20)	08:10 - 17:00 (-420)	09:00 - 17:00 (-420)	08:00 - 15:00 (-390)	

☒ Order Production - Dry Stores

Emp Id	Mo 08-02	Tu 09-02	We 10-02	Th 11-02	Fr 12-02	Sa 13-02	Su 14-02
Dupont, A.M., Anne-Marie	08:20 - 17:00 (10)	08:10 - 17:20 (10)	08:50 - 17:30 (-20)	08:50 - 16:40 (-70)	08:00 - 17:00 (-480)		
Duncan, L.H., Lynn - 162	08:50 - 15:00 (-170)	08:50 - 17:00 (-50)	08:10 - 14:10 (-180)	08:50 - 16:30 (-126)	08:00 - 17:00 (-480)		

☒ Telesales - Dry Stores

Emp Id	Mo 08-02	Tu 09-02	We 10-02	Th 11-02	Fr 12-02	Sa 13-02	Su 14-02
Key, A., Alana - 17	08:50 - 17:10 (10)	08:50 - 20:10 (190)			09:00 - 17:00 (-420)		
Jones, K.T., Katie - 172	07:10 - 18:00 (60)	07:10 - 18:30 (90)	07:10 - 18:10 (70)	07:10 - 19:40 (160)	07:10 - 18:30 (90)	08:00 - 14:00 (-150)	
James, R., Ritchie - 173	07:10 - 18:00 (60)	07:10 - 18:30 (90)	07:10 - 18:10 (70)	07:10 - 19:40 (160)	07:10 - 18:40 (100)	08:00 - 13:50 (-160)	
Hepworth, M.K., Michelle -	05:44 - 15:05 (561)	05:50 - 15:00 (0)	05:50 - 15:00 (0)	05:50 - 17:00 (120)	05:50 - 15:00 (0)		
Boardman, L., Lynn - 168	16:55 - 17:00 (5)		17:59 - 18:05 (6)		18:40 - 18:46 (6)		

9.1 Options in the icon bar (from left to right):



It is possible to add a note on a certain day. This is useful if a shift has been manually altered or overtime manually added. A note could display the reason for any manual adjustments. The notes icon will display a list of all notes for the particular group and week.

Daily Status Screen - Adding a Note

The screenshot shows the 'Daily Status' window for 2010, Week 6, Dry Store. The window has a title bar and a menu bar with icons for refresh, list, magnifying glass, and 'Update Absence Allowances'. Below the menu bar is a 'Groups' section with a tree view showing 'Admin - Dry Stores', 'Drivers - Dry Stores', 'Order Production - Dry Stores', and 'Telesales - Dry Stores'. The main area displays a table of employee shifts for each day of the week. A context menu is open over the 'Order Production - Dry Stores' section, showing options: 'Add Note', 'Add Standard Day', and 'Roster Planning'.

Emp Id	Mo 08-02	Tu 09-02	We 10-02	Th 11-02	Fr 12-02	Sa 13-02	Su 14-02
Anderson, V.F., Vicky - 15	07:20 - 18:20 (110)	07:20 - 18:50 (140)	07:20 - 18:30 (120)	11:10 - 20:00 (20)	07:20 - 18:40 (130)	07:30 - 15:00 (-480)	
Ahern, E.R., Erica - 13	08:40 - 20:30 (170)	07:30 - 16:30 (0) *	07:50 - 17:20 (30)	07:50 - 17:40 (50)	09:00 - 17:20 (-40)		
Paterson, J.J., Jo - 157	08:00 - 16:20 (80)	08:10 - 15:20 (10)	08:10 - 15:50 (40)	08:20 - 15:20 (0)	08:10 - 15:50 (40)		
Brooker, S.C., Sam - 152	10:41 - 17:07 (386)	08:00 - 17:20 (20)	08:40 - 17:20 (20)	08:10 - 17:00 (-420)	09:00 - 17:00 (-420)	08:00 - 15:00 (-360)	
Dupont, A.M., Anne-Marie	08:20 - 17:00 (10)	08:10 - 17:20 (10)	08:50 - 17:30 (-20)	08:50 - 16:40 (-70)	08:00		
Duncan, L.H., Lynn - 162	08:50 - 15:00 (-170)	08:50 - 17:00 (-50)	08:10 - 14:10 (-180)	08:50 - 16:30 (-126)	08:00		
Key, A., Alana - 17	08:50 - 17:10 (10)	08:50 - 20:10 (190)			09:00 - 17:00 (-420)		
Jones, K.T., Katie - 172	07:10 - 18:00 (60)	07:10 - 18:30 (90)	07:10 - 18:10 (70)	07:10 - 19:40 (160)	07:10 - 18:30 (90)	08:00 - 14:00 (-150)	
James, R., Ritchie - 173	07:10 - 18:00 (60)	07:10 - 18:30 (90)	07:10 - 18:10 (70)	07:10 - 19:40 (160)	07:10 - 18:40 (100)	08:00 - 13:50 (-160)	
Hepworth, M.K., Michelle -	05:44 - 15:05 (561)	05:50 - 15:00 (0)	05:50 - 15:00 (0)	05:50 - 17:00 (120)	05:50 - 15:00 (0)		
Boardman, L., Lynn - 168	16:55 - 17:00 (5)		17:59 - 18:05 (6)		18:40 - 18:46 (6)		



Data is loaded from the database when the screen is opened. If data has changed since the screen was opened, the refresh icon will pull up to date data from the database.



The Exceptions legend can be shown and hidden using the Exceptions icon. Individual exceptions can be highlighted to give the user a quick overview of issues such as, for example, employees that worked less than their shift or were absent. Exceptions that are not important at that time can be turned off by unticking them. Unticking Unknown Status should be avoided as errors may arise in the data if these exceptions are not dealt with.

The colours for each exception can be changed to suit the user in the Configuration screen under User Settings. Please see section 5.4 of this document for more details on changing colours.



The Daily Status screen is recalculated automatically each night. If any business rules or rosterings have been updated the Daily Status can be manually recalculated using the Recalculate icon.



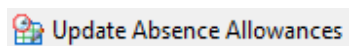
To print an overview of the Daily Status screen the Print Preview icon should be used.



The Daily Status can be filtered using the Filter icon. Clicking the icon will bring up the filter screen.

The Daily Status screen can be filtered using three different categories under which each is a multitude of additional options. The screen can be configured to show only certain exceptions or only days that have been manually modified. When viewing a large amount of these filters can be invaluable.

Daily Status Filter Screen

A screenshot of the 'Filter Records' dialog box. It has a title bar with 'Filter Records' and standard window controls. Below the title bar is a dropdown menu set to 'OR' and a small icon. There are three tabs: 'Day Status' (selected), 'Exceptions', and 'Pay Categories'. Under 'Day Status', there are two checkboxes: 'Clock Times Modified' and 'Adjustments Locked', both of which are checked. Below this is a list box containing the same two options, separated by 'OR'. At the bottom right are 'Save' and 'Cancel' buttons.

When adding holiday and absences to the Daily Status screen the system will create an absence record under the employee record in People Inc but will not update the absence allowance. This will be updated overnight but to update manually the Update Absence Allowances icon should be clicked.

9.2 Looking at a day in detail

A detailed view for a day is displayed by double clicking the day in the Daily Status screen.

Day Status Overview

Day Status Overview [Paterson, J.J., Jo - 157, 11/02/2010, 08:20 - 15:20 (0)]

Time In	08:20	Shift Start	08:00
Time Out	15:20	Shift End	15:00
Elapsed Time	7:00	Planned Hours	7:00
Paid	6:00	Planned Paid Hours	6:00
Unpaid	0:00	Contractual Hours	7:30
Paid Break	0:00	Clock Times Modified	<input type="checkbox"/>
Unpaid Break	1:00	Adjustments Locked	<input type="checkbox"/>
Unknown	0:00	Authorised	<input type="checkbox"/>
		Period Closed	<input type="checkbox"/>

Day Entries (5) | Adjustments | Exceptions (7)

Manual Automatic + - ▲ Update Absence Allowances

Start Time	End Time	Name	Duration
08:20	11:00	Present	2:40
11:00	11:30	Break	0:30
11:30	14:00	Present	2:30
14:00	14:30	Lunch	0:30
14:30	15:20	Present	0:50

Start Time	End Time	Name	Duration	Min.	H:M	Pay Category
11/02/2010 08:13:C	11/02/2010 15:23:C	Present	7.17	430	07:10	10

7.17 430.00

Close

The upper portion of the Day Status Overview screen displays crucial information relating to the day. The left hand column displays actual data collected from clockings whereas the right hand column displays planned times.

9.2.1 Day Entries Tab

A day may be made up of several different pay category bands such as Present, Break or Lunch displayed the Day Entries tab. These bands have a start time, end time and duration. Depending on how the shift has been set up these may be generated by clock times or the system may automatically insert bands such as a mandatory lunch break.

The default setting for managing the bands is Automatic. This will display the clocking data in full the day's pay category bands (either manually clocked or automatically clocked by the system) with no changes made to them

There may be occasions where changes need to be made to the Day Entries such as when an employee has forgotten to clock out. In this case the final Pay Category Band will be of type Unknown as opposed to Present. **People Inc. time** will insert the Unknown Pay Category whenever it requires manual intervention. This is because **People Inc. time** cannot know whether the employee clocked out early, late or on-time. The user must fill in this gap for the time and attendance information to be correct and complete.

To edit a Pay Category band the manual icon must be clicked. This will allow the user to double click on a band to open it up for editing. If an employee has forgotten to clock out then the end time should

be changed to their actual leaving time (this may require speaking to shift supervisors or the employee themselves) and the Name should be changed from Unknown to Present.

Day Status Overview [23/11/2011, EMP053]

Start Time: 23/11/2011 13:30

End Time: 23/11/2011 17:00

Name: Present

Save Cancel



The above icon will display actual clock times. This allows the user to see the times before the system applies any rounding.

People Inc. time holds the real world clock event data separately to any manual adjustments so all data is retained. To dismiss any manual changes and revert to the real clock times the setting can be switched to Automatic and the data recalculated.

9.2.2 Adjustment Tab

Day Status Overview - Adjustments Tab

Day Status Overview [Jones, K.T., Katie - 172, 13/02/2010, 08:00 - 14:00 (-150)]

Time In: 08:00 Shift Start: 06:00

Time Out: 14:00 Shift End: 15:00

Elapsed Time: 6:00 Planned Hours: 9:00

Paid: 5:30 Planned Paid Hours: 8:00

Unpaid: 0:00 Contractual Hours: 0:00

Paid Break: 0:00 Clock Times Modified: ☐

Unpaid Break: 0:30 Adjustments Locked: ☐

Unknown: 0:00 Authorised: ☐

Period Closed: ☐

Day Entries (3) Adjustments (2 : 0) Exceptions (11)

Lock

Category	Adjustment	Start Time	End Time	Duration	Amount	Time	Hourly Rat
150%	OT 150% Sat	08:00	10:00	2:00			
150%	OT 150% Sat	10:30	14:00	3:30			

Close

The Adjustments Tab displays any adjustments such as overtime applied to the day. The upper portion of the tab displays automatic adjustments made by the system using the business rules specified in the system. This section will show the start and end times of the period to be adjusted and the duration in hours.

The lower portion of the tab allows the user to add manual adjustments. This gives extra flexibility to make amendments for exceptional shifts for which normal business rules do not apply. The blue [+] icon is used to add an adjustment manually.

Manually Adding an Adjustment

Manual Amendment

Adjustment: Weekend

Category: OT 1.5

Result: Time

Duration: 00:00

Amount: 0.00

Minutes: 120.00

Reason: Came in on short notice due to Jim being off sick.

Save Cancel

The relevant adjustment should be specified in the Adjustment drop down. The Category can then be chosen. This usually relates to how the time will be adjusted. In the example above the overtime minutes will be added to the OT 1.5 category so the figure given relates to an overtime rate of time and a half.

The adjustment can be in minutes (Time option) or money (Amount option). This is specified in the Result dropdown. The actual adjustment can then be defined. The example above defines the minutes as 120. These are the minutes after any adjustment has been made so this

9.2.3 Exceptions Tab

The Exceptions tab will display a list of system generated exceptions throughout the shift. These give the user a detailed view of any changes made to the shift such as roundings, adding of a mandatory lunch Pay Category band or the employee clocked in too late.

Day Status Overview - Exceptions Tab

Day Status Overview [Jones, K.T., Katie - 172, 13/02/2010, 08:00 - 14:00 (-150)]

Time In: 08:00 Shift Start: 06:00

Time Out: 14:00 Shift End: 15:00

Elapsed Time: 6:00 Planned Hours: 9:00

Paid: 5:30 Planned Paid Hours: 8:00

Unpaid: 0:00 Contractual Hours: 0:00

Paid Break: 0:00 Clock Times Modified: ☐

Unpaid Break: 0:30 Adjustments Locked: ☐

Unknown: 0:00 Authorised: ☐

Period Closed: ☐

Day Entries (3) | Adjustments (2 : 0) | Exceptions (11)

Exception	Number
Clock out time adjusted according to rounding rule.	6003
Clocked in (120) minutes too late.	9001
Clocked out (60) minutes too early.	9002
Less calculated paid hours than planned; difference is (-150) minutes.	5002
Less calculated unpaid hours than planned; difference is (-30) minutes.	5009
Less elapsed time than planned hours; difference is (-180) minutes.	5004
Mandatory line (Break) is falling completely outside the clock in and clock out times.	7005
Mandatory line (Lunch) inserted.	7001
More calculated paid hours than contractual hours; difference is (330) minutes.	5006
No contractual hours found.	5010
No pay record found.	5011

Close

9.3 Adding a standard day

If an employee forgets to clock in it is possible to add a Standard Day to the Daily Status. This gives the option of adding any shift available to that employee and is much quicker than manually adding the Pay Category bands manually.

Adding a Standard Day is performed by right-clicking on a day and choosing 'Add Standard Day'

Daily Status - Adding Standard Day

The screenshot shows the 'Daily Status [2010, 6, Total]' window. At the top, there are dropdowns for 'Year' (2010) and 'Week' (6), and a 'Group View' dropdown set to 'Total'. Below these are icons for file operations and a button labeled 'Update Absence Allowances'. The main area is divided into sections for different employee groups:

- Drivers - Stores**: Contains one employee, Davies, M., Mark - 12, with shifts for Mo 08-02 to Su 14-02.
- Order Production - Dry Stores**: Contains two employees: Dupont, A.M., Anne - 1 and Duncan, L.H., Lynn - 1, with shifts for Mo 08-02 to Su 14-02.
- Order Production - Stores**: Contains one employee, Schwab, J.K., Julia - 1, with shifts for Mo 08-02 to Su 14-02.
- Telesales - Dry Stores**: Contains four employees: Key, A., Alana - 17, Jones, K.T., Katie - 1, James, R., Ritchie - 1, and Hepworth, M.K., Mich - 1, with shifts for Mo 08-02 to Su 14-02. A context menu is open for the 'Mo 08-02' column, showing options: 'Add Note', 'Add Standard Day', and 'Roster Planning'. The 'Add Standard Day' option is selected, and a sub-menu is visible showing two shift options: '6.00 - 15.00' and '9.00 - 17.00'.
- Telesales - Stores**: Contains one employee, Richardson, C.W., Ch - 1, with shifts for Mo 08-02 to Su 14-02.

The system will create a shift based on the planned roster for that day. If no roster exists for this day the user can choose which shift to use. The user can then edit this standard day to more closely resemble the real world

10 Pay Periods

Pay Periods in **People Inc. time** relate to the period for which employees are paid between pay runs. These periods may be weeks, months, 4 weeks or in some cases variable throughout the year. Pay Periods are used in many of the reports. Period adjustments may also have been set up in the system to calculate overtime worked throughout the period. Due to this Pay Periods should be created before employees start clocking in for that period.

Pay Periods are defined per group. This allows the organisation to cope with several different pay bases using the same software. For instance office staff may be paid monthly and production staff could be paid weekly with overtime or flexitime calculated by the week.

10.1 Creating Pay Periods

Multiple Pay Periods can be created for several groups at once using the supplied wizard - 'PI Time Create Pay Period Wizard'.

The wizard is launched from the wizard drop down in **People Inc. time**. The wizard allows the user to specify which groups to create Pay Periods for using the tick boxes in the left hand panel. Clicking a group name will display the Pay periods currently defined for that group.

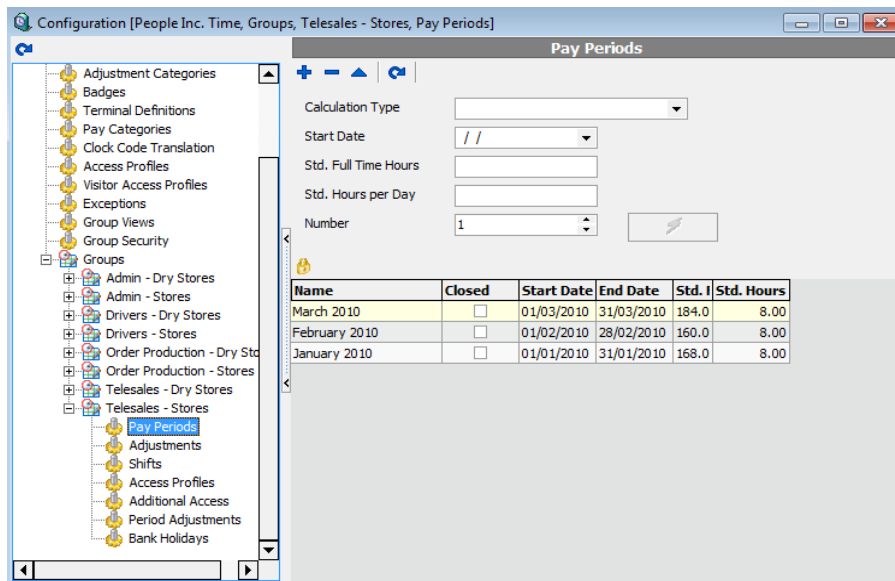
Once the relevant groups are ticked the right hand panel should be completed with the relevant information. The Name and End Date boxes will only be editable if the Calculation Type 'Variable' is chosen. Standard Full Time Hours and Standard Hours per Day are only required if overtime period adjustments are based on company standard hours. If overtime calculations for the period are based on company standard hours it is important that these are included.

PI Time Create Pay Period Wizard

Name	Start Date	End Date
March 2012	01/03/2012	31/03/2012
February 2012	01/02/2012	29/02/2012
January 2012	01/01/2012	31/01/2012

Pay periods can also be created in much the same manner as the Wizard the Configuration screen under Groups, Pay Periods. This screen does not have the option to create Pay Periods for multiple groups at once. To create Pay Periods for multiple groups the PI Time Create Pay Period Wizard should be used.

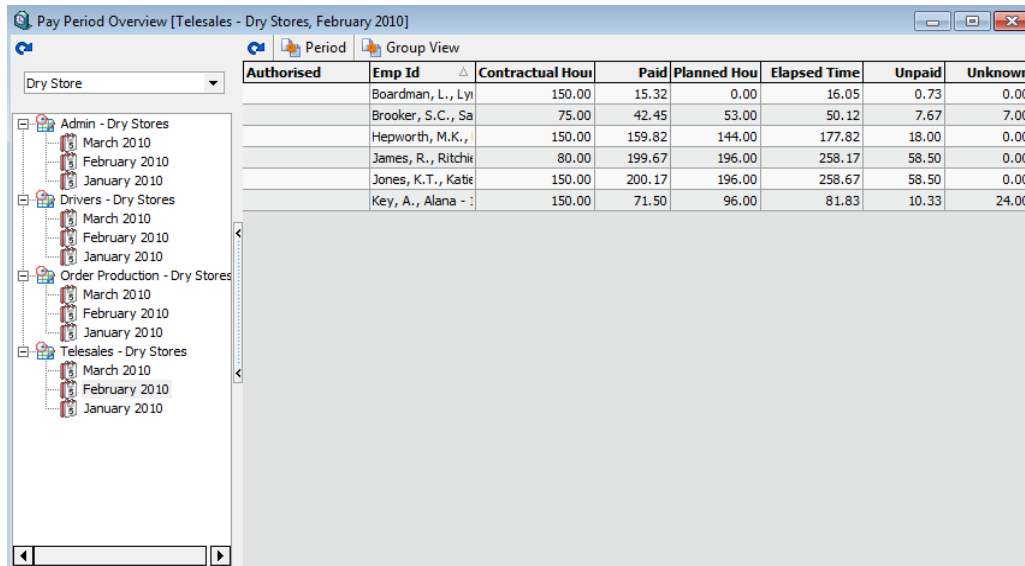
Configuration - Pay Periods



10.2 Pay Period Overview

The Pay Period Overview screen allows the user to see all clocked hours over the course of the Pay Period.

Pay Period Overview



Under each group, the available Pay Periods are displayed. Clicking the period will show all employees that have hours registered in that period.

Double clicking an employee within the period will display a detailed view.

Pay Period Overview

Pay Period Overview [Hepworth, M.K., Michelle - 178, January 2010]

Contractual Hours	157:30	Std. Full Time Hours	168:00	Opening Balance	0:00	Lost	0:00
Paid	167:50	Unpaid	3:00	Booked	0:00	Pay	0:00
Paid Break	0:00	Unpaid Break	17:00	Taken	0:00		
Total Paid	167:50	Total Unpaid	20:00	Closing Balance	0:00		
Planned	153:00	Elapsed Time	187:50	Carried Forward	0:00		
Unknown	0:00			Carry Forward	0:00		

Authorised ☐
Period Closed ☐ Allowance Adj. Locked ☐ Adjustments Locked ☐ Bookings Closed ☐

Adjustment Totals | Written to Allowance | Period Adjustment Totals (1 : 0) | Period Booking Totals | Exceptions (1) | Period Calculation Overview (9)

Category	Adjustment	Duration	Time	Amount
----------	------------	----------	------	--------

Close

The upper portion of the screen displays the crucial information for this period including contractual hours and actual paid hours.

People Inc. time allows flexi time to be dealt with in two different ways.

- Flexi-time can be written to an allowance once the Pay Period is closed. In this scenario an employee would then be able to book absences against this allowance.
- Flexi-Time can be carried forward into the next pay period without writing it to an allowance. This setting is most regularly used within an office environment where employees are able to work fewer hours one day but make up the difference another day.

10.2.1 Adjustment Totals Tab

Pay Period Overview - Adjustment Totals

Adjustment Totals (1) | Written to Allowance | Period Adjustment Totals | Period Booking Totals | Exceptions (1) | Period Calculation Overview (9)

Category	Adjustment	Duration	Time	Amount
150%	OT 150% Sat	1:30		

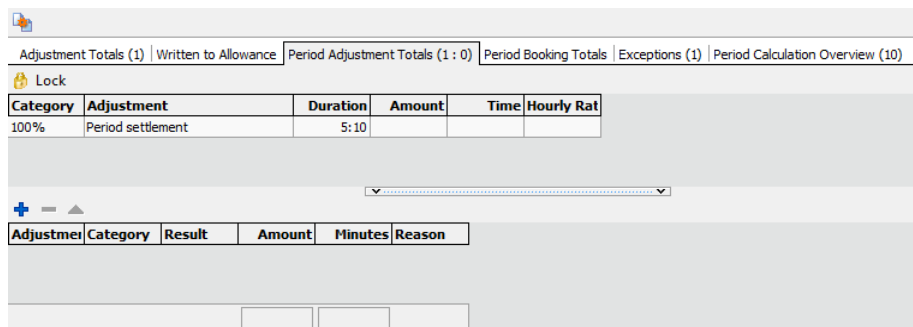
The Adjustment Totals tab calculates the total figure for each adjustment rule throughout the period.

10.2.2 Written to Allowance Tab

If any daily adjustment rules are configured to write to an allowance it will be displayed in this tab.

10.2.3 Period Adjustment Totals Tab

Pay Period Overview - Period Adjustment Totals



Category	Adjustment	Duration	Amount	Time	Hourly Rat
100%	Period settlement	5:10			

Adjustme	Category	Result	Amount	Minutes	Reason
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Any overtime adjustments based on Pay Period will be found in the Period Adjustment Totals. These are separated per category.

Adjustments can be manually added, removed and modified using the Add [+], Delete [-] and Modify [▲] icons.

If you have set overtime rules based on a Period Level you will find the result on this Tab. In the above example the Employee has worked 2:32 hours more than his contractual hours in the period. The employee gets 25% extra over these hours.

10.2.4 Period Booking Totals Tab

Any adjustments that are based on period will be displayed under this tab.

Adjustments can be added and edited manually using the Add [+], Delete [-] and Modify [▲] icons.

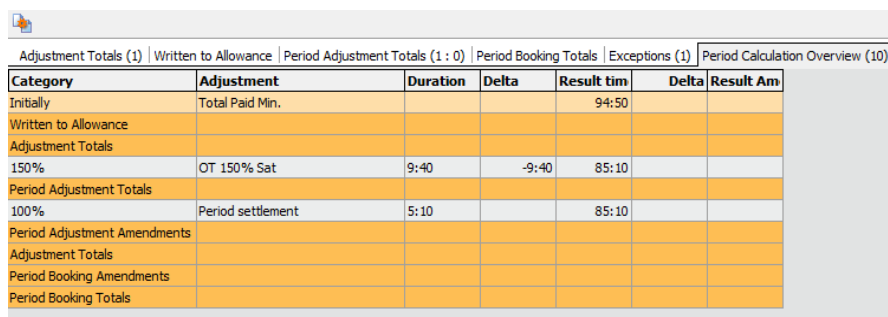
10.2.5 Exceptions Tab

The Exceptions tab displays any exceptions related to the period. This allows the user to see and correct any issues before closing the pay period.

10.2.6 Period Calculation Overview

An overview of the period covering all rules can be viewed under the Period Calculation Overview.

Pay Period Overview - Period Calculation Overview



Category	Adjustment	Duration	Delta	Result tim	Delta	Result Am
Initially	Total Paid Min.			94:50		
Written to Allowance						
Adjustment Totals						
150%	OT 150% Sat	9:40	-9:40	85:10		
Period Adjustment Totals						
100%	Period settlement	5:10		85:10		
Period Adjustment Amendments						
Adjustment Totals						
Period Booking Amendments						
Period Booking Totals						

11 Period Authorisation

Period Authorisation screen allows the Human Resources department to see whether an employee's hours have been authorised when the management of departments is distributed across the organisation.

Period Authorisation Screen

Employee	Authorised	Date	Notes
Boardman, L., Lynn - 168	<input checked="" type="checkbox"/>	02/03/2011	
Brooker, S.C., Sam - 152	<input type="checkbox"/>		
Hepworth, M.K., Michelle - 176	<input checked="" type="checkbox"/>	02/03/2011	
James, R., Ritchie - 173	<input type="checkbox"/>		
Jones, K.T., Katie - 172	<input type="checkbox"/>		
Key, A., Alana - 17	<input type="checkbox"/>		

At the end of a pay period a manager should ensure that each employee's hours as seen in the Daily Status are correct. Once this has been confirmed the employee's hours can be authorised in the Period Authorisation screen. Once all employees have been authorised no changes can be made except by a super user. Human Resources can then close the period.

Authorisation can be disabled in the 'Close Pay Period' wizard if this feature is not required.

12 Closing a period

At the end of a pay period, once all exceptions have been checked and corrected, the user will want to close the period. Once a period has been closed no changes can be made to it. This is done once the final hours have been sent to payroll to ensure that hours in **People Inc. time** and hours in Payroll are always identical.

If the system contains any flexi-time rules that write to an allowance, these will be written as the period closes.

Periods can be closed in the Configuration screen under Groups -> Pay Periods.

Configuration - Pay Period Screen

Name	Closed	Start Date	End Date	Std. H	Std. Hours
March 2010	<input type="checkbox"/>	01/03/2010	31/03/2010	184.0	8.00
February 2010	<input type="checkbox"/>	01/02/2010	28/02/2010	160.0	8.00
January 2010	<input checked="" type="checkbox"/>	01/01/2010	31/01/2010	168.0	8.00

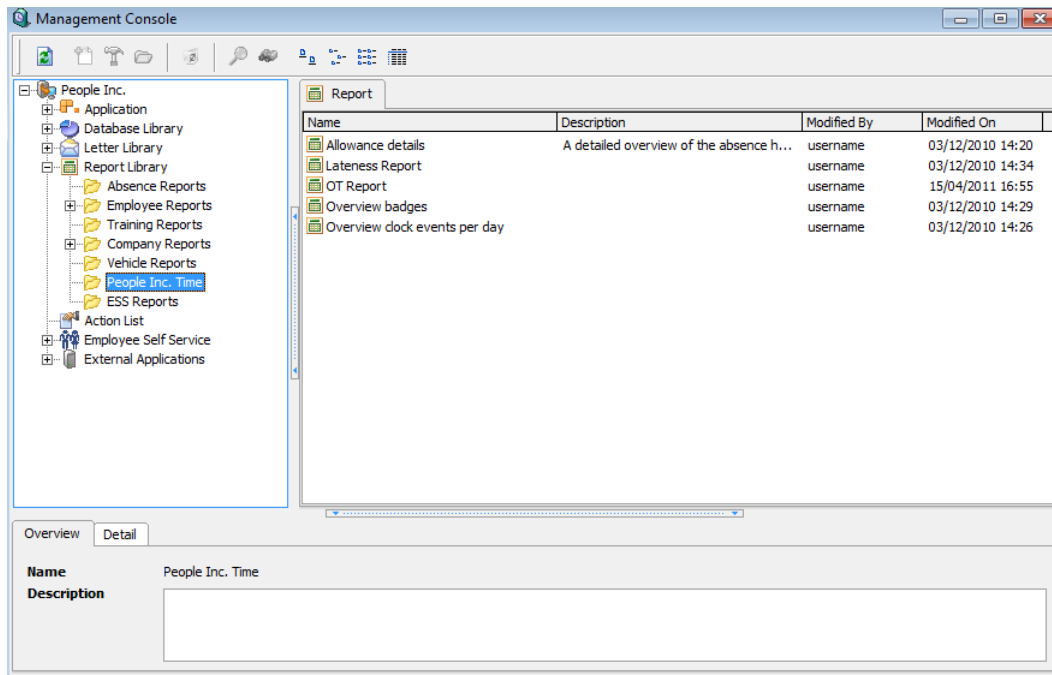
Once a Pay Period is selected clicking the lock icon will close the Period.

13 Reporting

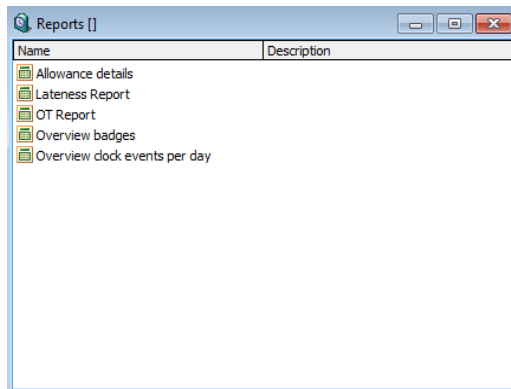
There are two different types of report in **People Inc. time**. There are standard reports that are accessed from the Reports option in the **People Inc. time** sidebar and there are External Reports (accessible from the External Reports option in the sidebar).

Standard reports are accessible through both the **People Inc. time** interface and People inc. This enables profiles to be set up to see only certain reports and no clocking data. Standard reports are accessible through the People Inc Time folder in the report library.

Standard Report Folder - Management Console



Standard Report Folder - People Inc Time



13.1 External Reports

In **People Inc. time** there are also External Reports. These are highly interactive reports that allow users to see a variety of information filtered in many ways to suit their need. **People Inc. time** has several interactive reports. Default External reports include an Employee Status report to show all employees clocked in, a Timesheet report and a payroll export.

External Report

Format

Hours

Hour:Min

Absence Units

Hours

☐ Short

Employee

Name

Surname, Initials

☒ EmployeeID
 ☐ Date of Birth

☐ Date of Join
 ☐ Leaving Date

Job

☐ Job (start.. enddate)
 ☐ Company and Department

Hours

☐ Planning times
 ☐ Difference
 ☐ Period Adjustments
 ☐ Booking Adjustments

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These reports can also be exported into Excel, PDF and other file formats.